

Predictive Performance & Fit

Passion & Purpose

Experience &
Knowledge

Critical Thinking

Focus of Thinking

Workplace
Motivators

Natural Behaviors

Group Dynamics

When it comes to choosing the right individual to join your organization or the right combination of individuals to form a project team, executive group or board of directors, it's all about predicting performance and fit.

Once you are more aware of yourself, the people you work with, and the dynamics of any group of people, you can:

- Select the right people for the right position
- Develop the right people to be their best and deliver high performance and results
- Transform groups of people into high-performing teams

Right fit elevates the performance of the right people. Fit to what?

- Their responsibilities, roles, and duties
- Their direct supervisor
- Any group of people they need to team with
- The culture of the organization

How can you predict performance without considering the environment into which the potential right person is being placed? Careful assessment of both is required.

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What do we mean by PASSION & PURPOSE?

Passion and purpose are at the core of an individual's make-up. They are the forces that can compel the individual to strive and achieve.

The Life Purpose Worksheet

Many people lead uninspired lives in unfulfilling jobs. For one reason or another, they have failed to make an intentional connection between their passion and purpose and their life plan. Completing the Life Purpose Worksheet helps people discover – or rediscover – these connections and put enthusiastic action back in your personal and professional life. Reviewing this information also helps employers and prospective employers understand an individual's short-term and long-term goals in the context of fit and potential performance.

How does this apply in business?

When our core values and life purpose align with the working environment and the goals of the organization, a natural synergy occurs. This synergy allows the individual to apply natural passions, enthusiasm, and life goals more optimally. With this synergy, an individual will make more optimal decisions – which in turn will help the organization achieve and sustain success.

Life Purpose Worksheet

Wouldn't you love to spend more of your waking hours doing what you love and are good at, in a culture that shares your values? This worksheet is designed to help you clarify your purpose, passions, goals, and values in order to gain an understanding of how you might fit in a certain organizational environment. You will get back what you put into it: invest enough time and effort to ensure your answers are complete and meaningful to you.

Name		Date			
1. PASSION					
The jobs, chores, tasks, assignments, activities that I've enjoyed most include ...					
2. STRENGTHS					
My natural talents and gifts (things I do better than others) are ...					
3. DISLIKES					
The jobs, chores, tasks, assignments, and activities I've done that I've disliked are ...					
4. WEAKNESSES					
In full candor, the things I am truly not good at doing include ...					
5. ENVIRONMENT					
The ideal business scenario for my passions and talents is ...					
The BEST type of organization for me – where I would love to spend my time – is ...					
The WORST type of organization for me – where I would NOT want to spend my time – is ...					
6. DREAMS					
The complete list of everything I want in my life to make me feel deeply, profoundly happy, fulfilled, satisfied, energized, motivated, and purposeful includes ...					
7. LIMITATIONS					
The things most holding me back from greater success are ...					
8. WEALTH RIGHT NOW					
If you won the lottery and you had \$20 million after taxes - what would you do differently, and how would your life change?					
9. VALUES					
The things missing from my life that I find myself wishing for are ...					
The tribute statements I would want to hear about me and my life – that I most want to be remembered for – are ...					
My five or six most important values are ...					
10. PURPOSE					
What do you suppose you are meant to do with your life? What is your personal mission?					
11. GOALS		In 6 months	In 12 months	In 5 Years	In 10 Years+
Annual Income					
Net worth					
Career					
Education & Personal Development					
Family & Relationships					
Hobbies & Pastimes					
Spirituality					

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What do we mean by EXPERIENCE & KNOWLEDGE?

Experience and knowledge are the education, previous work experience, training, industry knowledge, and skills an individual brings to a position. Organizations commonly feel they evaluate an individual's experience and knowledge by reviewing a resume and interviewing the individual – but the critical steps of verification and testing often are skipped.

How do we evaluate EXPERIENCE & KNOWLEDGE?

Typically experience and knowledge are initially presented through a resume or job application, followed by an interview. This can be an effective way to gather basic information about an individual's personal and work history, but it is important to take this a few steps further and:

1. Learn more about personal and work history
2. Verify history, including performing background checks
3. Test knowledge and skills required for the position

1. Learn about personal & work history

Information sources: Resume or job application, interview with candidate

What to check: resume/application

- Is information free of errors?
- Is information presented clearly and accurately?

Resume

Job Title: Aerospace	Job Category:	
Department/Group:	Job Code/ Reg#:	
Location:	Travel Required:	
Level/Salary Range:	Position Type: [A, Full-time, part-time, job share, contract, interim]	
External posting URL: Once you have edited your job description, click here to post the job on Monster.com.		
Internal posting URL:		

Clothing Designer

Job Purpose:

Increase mortgage loan portfolio by developing business contacts; attracting mortgage customers; completing mortgage loan processing and closing; supervising staff.

Duties:

- Approves mortgage loans by examining application and supporting documentation; estimating credit-worthiness; calculating interest rate.
- Completes mortgage loans by monitoring collection, verification, and preparation of mortgage loan documentation, scheduling and completing mortgage loan closing.
- Protects bank's image by keeping mortgage loan information confidential.
- Updates job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks, participating in professional organizations.
- Accomplishes bank mission by completing related results as needed.

Skills/Qualifications:

- Audit, Financial Skills, Financial Software, Customer Service, Thoroughness, Confidentiality, Analyzing Information, Decision Making, Verbal Communication, Professionalism, Quality Focus

Approved By:	Date:
Last Updated By:	Date/Time:

What to check: interview

- What challenges and opportunities did the individual encounter?
- What successes and failures did the individual experience?
- What does the individual think about each of these?

2. Verify personal & work history

Information sources: previous employers, DSHS, sheriff, drug testing

What to check

- Dates employed, position titles, number of direct reports
- Salary and other compensation
- Feedback from previous supervisors and direct reports
- Results of past performance assessments
- Degrees/certifications earned
- Criminal & credit history
- Evidence of past/current drug use

Performance Review Assessment

Employee: _____	Review Date: _____
Position: _____	Yrs/Mos in Position: _____
Reviewer: _____	Review Period: _____

To complete this review:

- Both employee and supervisor rate the employee's performance using the following scale, scoring performance on a scale of 0.0 (lowest) to 5.0 (best).

Performance Rating Scale Levels						
Poor	Mixed	Fair	Solid	Strong	Excellent	Best
0.0 - 1.0 Inadequate performance. Requires active supervision and coaching. Consistent poor performance.	2.0 - 2.4 Achieving low goals. Requires active supervision and coaching. Occasional performance work.	2.5 - 2.9 Occasionally meets goals. Requires active supervision and coaching. Occasional performance work.	3.0 - 3.4 Consistently meets goals. Requires active supervision and coaching. Occasional performance work.	3.5 - 3.9 Consistently meets goals. Requires active supervision and coaching. Occasional performance work.	4.0 - 4.5 Highly exceeds goals and expectations. Consistently meets goals and expectations. Occasional performance work.	4.6 - 5.0 Exceeds goals and expectations. Consistently meets goals and expectations. Occasional performance work.
Distribution: 5%	Distribution: 15%	Distribution: 20%	Distribution: 20%	Distribution: 20%	Distribution: 15%	Distribution: 5%

- Use N/A for any areas or sections that are not applicable.
- Employee and supervisor need discuss only the areas for which scores differ and, on those, a final number must be reached.
- At the end of each section, an average of the scores in that section will be tabulated to some decimal place (for example, 3.40 - 3.5, while 3.48 - 3.4).

PERFORMANCE RATING

A. Key Areas of Essential Responsibilities		
Describe key responsibilities from the POSITION RESULTS FORM		
	Employee	Supervisor
1.		
2.		
3.		
4.		
5.		
Average rating on Key Areas of Essential Responsibilities: _____		

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3. Test knowledge & skills

Information sources: tests, demonstrations, simulated real-life situation

What to check – examples

- For an engineer, test ability to read blueprints, ability to design
- For a software/web developer, ask for a live-fire demonstration
- For a management position, describe a situation and ask how the individual would address the situation, using what tools/approaches
- To assess communication skills, request a business writing sample
- To assess software proficiency, request completion of a small project

How does this apply in business?

Information provided by a prospective employee or internal applicant about his/her education, work experience, and abilities needs to be verified through research, tests, and demonstration. Check the results against the requirements of the position.

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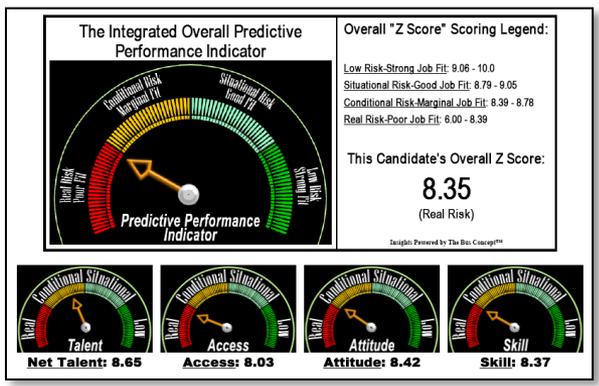
Team Evaluation

What do we mean by CRITICAL THINKING SKILLS?

- Critical thinking skills define an individual's capacity to:
- **PERCEIVE** the core issues that are driving the problems
 - **CONCEIVE** workable solutions to those problems
 - **IMPLEMENT** those solutions within company guidelines (rules, legal, etc.) and within the framework of available resources

How do we evaluate CRITICAL THINKING SKILLS?

Critical thinking skills, which are always measured and compared to a specific job benchmark, are represented by the "Z Score" on the Performance Zone report. This measurement reflects an individual's critical thinking capacity in a given position, such as a leadership, management, sales, or administrative role.



How do we measure CRITICAL THINKING SKILLS?

The science behind the Hartman Value Profile explains that each of us sees two views in three dimensions.

- Our **WORLD VIEW** is our capacity for:
- Systems judgment
 - Practical thinking
 - Empathy toward people

- Our **SELF VIEW** is our sense of:
- Self direction, or where we ought to go
 - Role satisfaction, or social contribution
 - Self esteem, or our own value of ourselves

How do the dimensions impact CRITICAL THINKING SKILLS?

Think of an individual as a car, and the capacity for critical thinking as the horsepower of the engine. The six dimensions of critical thinking represent the engine's six cylinders. Unlike the cylinders in your car engine, these decision-making pistons fire independently and create different levels of drive or influence on the overall power of the engine. Each person is influenced to differing degrees by each of the six dimensions, and the resulting unique pattern is the reason we are all unique and see things from different perspectives.

What variables impact the force of the cylinders [dimensions]?

- **CLARITY:** How clearly the individual understands that particular dimension
- **ATTENTION/BIAS:** The degree of importance the individual applies to that dimension, combined with how clearly the individual understands that dimension. The more attentive and positive, the more important; the more inattentive and negative, the less important.

Let's look at two individuals whose empathy cylinders fire very differently:

One individual has **CRYSTAL CLEAR** empathy with an **INATTENTIVE BIAS**. He designs a process he knows will be unpopular with the people who have to execute it, but he doesn't care; his view is "Just do it!"

The other individual has **CRYSTAL CLEAR** empathy with an **OVERATTENTIVE BIAS**. He designs a process he knows will be unpopular with the people who have to execute it. He works very hard to listen to the concerns of those people and makes adjustments to ensure the people will be ok with the process - perhaps at the risk of compromising the integrity of the process.

How does this apply in business?

Just as different engines serve different purposes – racing, fuel efficiency, all-terrain exploration – different critical thinking skills serve different purposes in the business setting. For that reason, when we talk about critical thinking, we always talk about fit to the position and to the environment (which includes the position's immediate supervisor, the teams the individual works on and with, and the organizational culture).

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What do we mean by FOCUS OF THINKING?

An individual's **FOCUS OF THINKING** reflects his/her natural priority path used to face challenges, solve problems, and make effective decisions.

How do we evaluate FOCUS OF THINKING?

Focus of thinking is evaluated by the Hartman Value Profile and presented in the Nine Pathways Report. The Nine Pathways Report shows how an individual prioritizes their focused thinking as a manager, a team member, or an employee.

What are the Nine Pathways?

1. Building trust and a common bond: Treating each person as unique, building confidence and competence, respecting the rights of each person
2. Building team synergy: Cooperating and sharing, making certain each person feels part of the team; listening, delegating, and developing; being fair and consistent
3. Setting vision, mission, and purpose: Personal commitment, dedication; optimism, seeing and expecting the best; sense of purpose and meaning
4. Instilling responsibility and integrity: being responsible and accountable; walking the walk, keeping promises; respecting principles, standards, & codes

5. Focusing on results: Putting yourself into your work; paying attention to getting things done; prioritizing actions, setting priorities
6. Success Strategies and Discipline: Personal discipline; translating plans into action, being effective and efficient; building well-organized strategies and long-term goals
7. Fostering innovation and change: Learning to adapt and grow; acting as a change agent and risk taker; being inventive, spontaneous, creative, thinking outside the box
8. Preparation and tactics: Personal competence and confidence; knowing what is needed to get the job done, documenting success; building action plans, schedules, and timelines
9. Maintaining consistency and conformity: Respecting authority, rules, and codes; setting clear goals; creating standards

How does this apply in business?

When evaluating an individual's fit and potential performance in a particular position or on a team, check the individual's degree of compatibility with his/her supervisor and other team members. (similar order) represents strategic alignment; tactical alignment (different, but complementary, order).

PRIORITIZED INDIVIDUAL FOCUS									
	Building Trust (Being yourself)	Team Synergy (Being responsive to others)	Vision & Mission (Finding your vision)	Responsibility & Integrity (Being true to yourself)	Getting Results (Being productive)	Strategies & Discipline (Knowing your heading)	Innovation & Change (Being unique & creative)	Preparation & Tactics (Being prepared)	Consistency & Conformity (Being consistent)
Supervisor	2	5	1	8	9	4	7	6	3
Team Member	9	5	3	7	6	2	8	1	4
DIFFERENTIAL IN SHARED THINKING									
	7	0	2	1	3	2	1	5	1
INDIVIDUAL FOCUS	1-3 primary focus	4-6 secondary focus	7-9 inconsistent focus						
DIFFERENTIAL	0-2 strong alignment	3-5 moderate alignment	6-8 poor alignment						



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What do we mean by WORKPLACE MOTIVATORS?

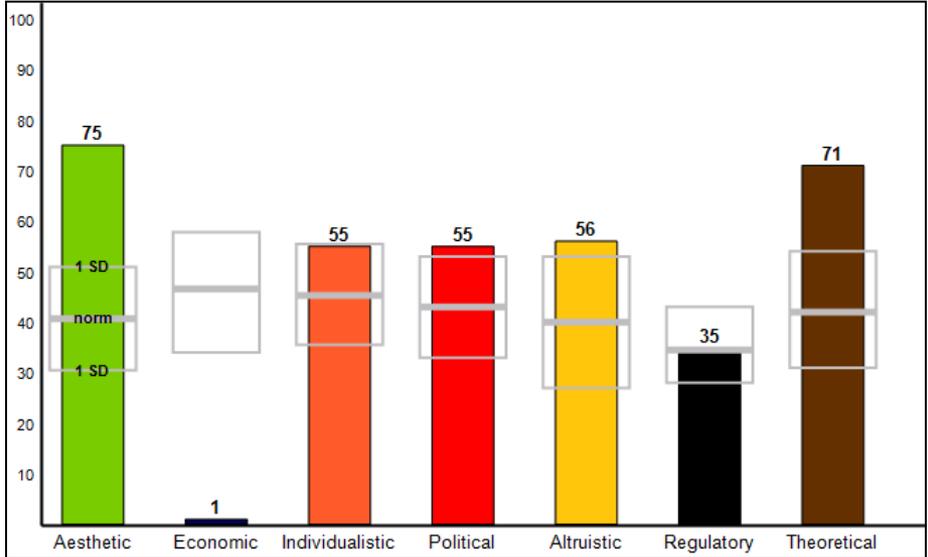
Our **WORKPLACE MOTIVATORS** are the factors that drive and motivate us in the workplace and how we prioritize our pursuits. Our balance of the seven workplace drivers reflects, contributes to, and influences our decision making pattern and impacts how we apply our capacities, skills, and abilities in the workplace.

How do we evaluate WORKPLACE MOTIVATORS?

Workplace drivers are evaluated through the Workplace Driver Index. This evaluation identifies the **relative strength of the seven workplace drivers** for an individual, and provides insight about **how the drivers work together to influence that individual's decision making.**

What are the seven WORKPLACE MOTIVATORS?

- **Aesthetic:** Driven to achieve balance and harmony, to find form or beauty. Often motivated by environmental concerns or “green” initiatives.
- **Economic:** Motivated by opportunities for economic gain and practical returns. Prefers a professional approach with a focus on bottom-line results.
- **Individualistic:** Driven by a need to be seen as unique, and independent, to stand apart from the crowd. Values opportunities for personal expression.
- **Political:** Driven to be seen as a leader and to have influence and control over one's environment or success. Often associated with competitiveness.
- **Altruistic:** Driven to benefit others in a humanitarian sense, with genuine sincerity to help others and to give of one's time, resources, and energy.
- **Regulatory:** Driven to establish order, routine, and structure. Strong desire to promote rules and policies and a traditional approach, and security through standards and protocols.
- **Theoretical:** Motivated by a desire to understand, gain knowledge, or discover the “truth.” Often driven to gain knowledge for knowledge's sake. Places a high value on rational thinking, reasoning, and problem solving.



How does this apply in business?

Understanding the relative strength of your seven workplace drivers will empower you to recognize and understand why you naturally place your attention on some things more than others, and why some things don't seem important to you at all. With this insight about yourself, you will be able to identify opportunities to contribute in areas that align with your drivers – and in situations where you are called upon to contribute in other areas, you will know that you may need to create a structure to keep yourself on track.

Understanding another individual's workplace drivers – whether you are a manager, subordinate, or fellow team member – also will help you appreciate that each of us comes to the table with different motivations and responds to different aspects of the same project or problem. If you are a manager or team leader, understanding the primary motivators of potential team members will empower you to design your teams more effectively.

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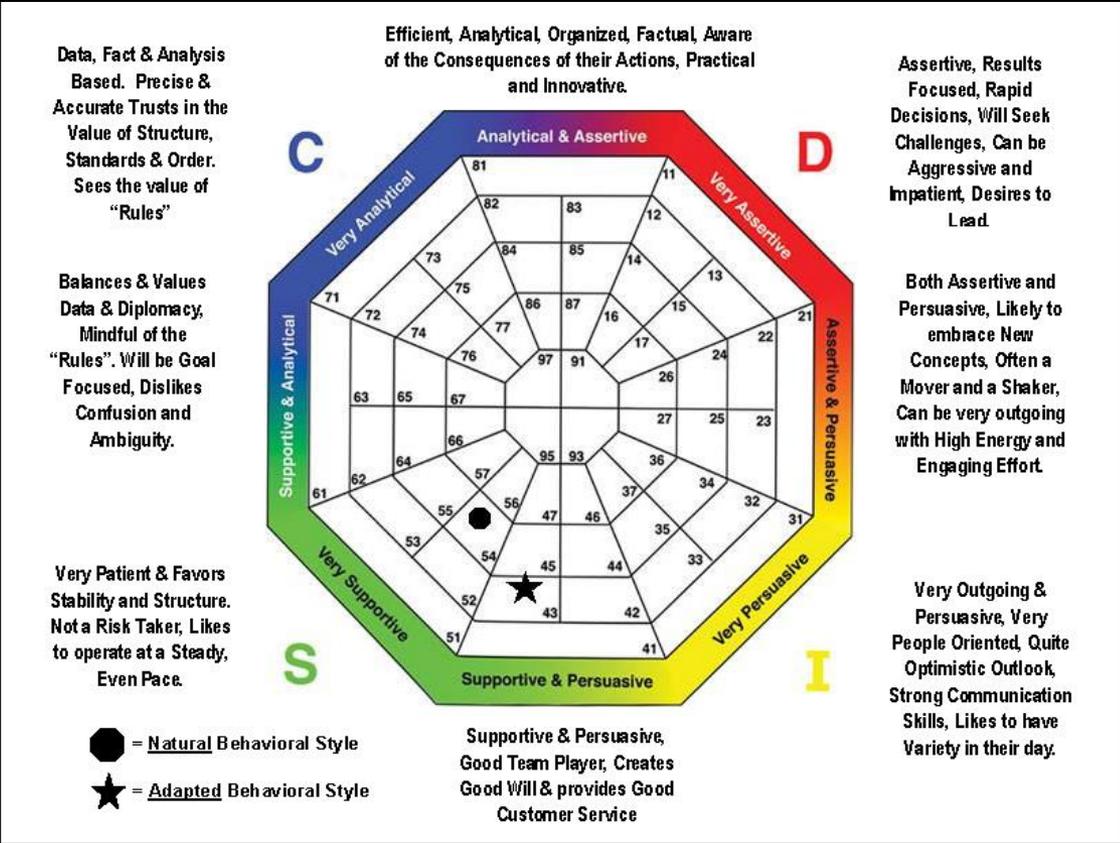
What do we mean by NATURAL BEHAVIORS?

Our **NATURAL BEHAVIORS** define how each of us will deliver our focused critical thinking and core values into the world. Natural behaviors are how we transmit our decisions to others.

How do we evaluate NATURAL BEHAVIORS?

Natural behaviors are identified through the DISC Behavioral Profile in terms of:

- **Dominance [D factor]:** How assertively and aggressively an individual prefers to deal with the **PROBLEMS** they encounter. Individuals who plot in the upper right "D" quadrant of the behavioral diamond will typically exhibit a more assertive, guarded and direct results oriented behavioral style.
- **Influence/Extroversion [I factor]:** How an individual prefers to deal with the **OTHER PEOPLE** they encounter. Individuals whose integrated plot is in the lower right "I" quadrant of the behavioral diamond will typically exhibit a more people oriented, direct but open behavioral style.
- **Steadiness/Patience [S factor]:** How an individual prefers to deal with the **ACTIVITY LEVEL** or **PACE** of their daily agenda. Individuals whose integrated plot is in the lower left "S" quadrant of the behavioral diamond will typically exhibit a more indirect but open, patient and teaming behavioral style.
- **Conscientious/Compliance [C factor]:** How an individual prefers to deal with the "rules," attention to detail, accuracy, and data. Individuals plotting in the upper left "C" quadrant will typically exhibit a more indirect, guarded, data-focused, detailed, and analytical behavioral style.



How does this apply in business?

People naturally embrace – or are put off by – others without understanding why. Understanding how you interact with people and how you impact the dynamics of a team is crucial to knowing how to positively influence successful outcomes. Being clear about others' natural behavioral approach improves communication, understanding, acceptance, teamwork, and results.

PUTTING IT TOGETHER: TEAM PERFORMANCE & FIT

Passion & Purpose

Experience & Knowledge

Critical Thinking

Focus of Thinking

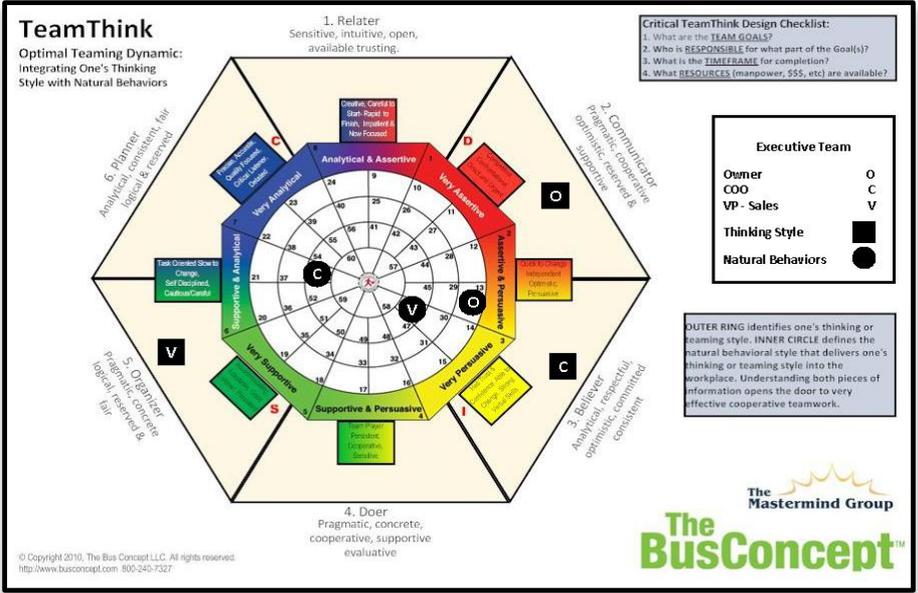
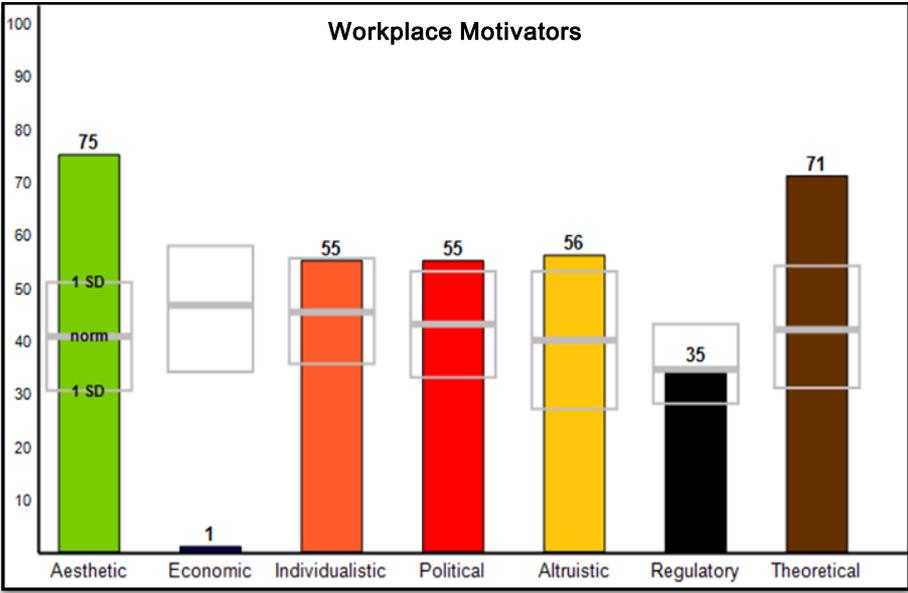
Workplace Motivators

Natural Behaviors

Team Evaluation

What do we look for when we evaluate a group of individuals?

Looking at workplace motivators, focus of thinking, and natural behaviors, we look at how the members of the team fit together: is there a strategic fit (alignment) or a tactical fit (balance)? Are there any potential problems: too many similarities? too many differences? missing talent in any of the five assessed elements?



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